

AMENDMENTS TO THE CLAIMS

This listing of claims will replace all prior versions and listings of claims in the application:

Listing of Claims:

1. (Currently amended) A relationship management system, comprising:

a first database that stores a plurality of user collections, wherein each user collection is accessible by a user of the system and including includes one or more first contact files, each first contact file including contact data that is unique to a particular one of the first contact files;

a second database that stores a firm collection, wherein each firm collection is accessible by an administrator of the system, the firm collection including a second contact file for each different first contact file included in the plurality of user collections, each second contact file having at least a portion of data in common with one of the first contact files; and

an administration routine stored in a memory and adapted to be executed on a processor to detect a change made to the common data of one of the first contact files within one or more of the plurality of user collections, to generate an event action in response to detecting the change, the event action consisting of an accept action, a review action, a submit action, or a follow-up action, to classify the change as one or more of add, edit, delete, format change, and suspect change, and to send a message including the event action classified change to the administrator of the system;

a change management routine stored in the memory and adapted to be executed on the processor to receive a response to the message event action from the administrator, and to process the response by one or more of approving, rejecting, or following-up on the change event action with a different owner having a user collection that includes the common data;

wherein approving the change prompts the relationship management system to make the change to the common data of the corresponding second contact file within the firm collection and to make the change to the common data of the remaining user collections.

2. (Previously presented) The relationship management system of claim 1, further including a user collection change routine adapted to make a change to the common data of a contact file associated with the particular contact within a second one of the user collections based on the change made to the common data of the corresponding second contact file associated with the particular contact within the firm collection.

3. (Original) The relationship management system of claim 2, wherein the administration routine is further adapted to provide a message to a firm administrator reflecting the nature of the detected change made to one of the contact files associated with a particular contact within one or more of the plurality of user collections.

4. (Previously presented) The relationship management system of claim 3, wherein the administration routine is further adapted to enable the firm administrator to accept or reject the detected change before the administration routine makes the change to the common data of the corresponding second contact file associated with the particular contact within the firm collection.

5. (Original) The relationship management system of claim 3, wherein the administration routine includes a rule database that stores rules pertaining to the manner in which the detected change is to be processed.

6. (Original) The relationship management system of claim 5, wherein the rules are changeable by the administrator.

7. (Original) The relationship management system of claim 2, wherein the administration routine is further adapted to process the detected change to detect a suspected error within the detected change.

8. (Currently amended) The relationship management system of claim 7, wherein the administration routine is further adapted to provide a message to ~~a firm the~~ administrator reflecting a description of the suspected error within the detected change.

9. (Original) The relationship management system of claim 2, wherein each of the user collections includes a change attribute that specifies a manner in which a change made to the firm collection is to be reflected within the user collection.

10. (Original) The relationship management system of claim 9, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be automatically made to the user collection.

11. (Original) The relationship management system of claim 9, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be reported to a user having access to the user collection for which the change attribute exists.

12. (Original) The relationship management system of claim 9, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be accepted by the user having access to the user collection for which the change attribute exists before being made to the user collection for which the change attribute exists.

13. (Original) The relationship management system of claim 2, wherein each of the user collections includes a visibility field that specifies if a change made to a contact file within the user collection is to be shared with the firm collection.

14. (Original) The relationship management system of claim 13, wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of one of the contact information fields.

15. (Original) The relationship management system of claim 13, wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of an entire contact file.

16. (Previously presented) The relationship management system of claim 1, wherein the administration routine is further adapted to process the detected change to detect the addition of the first contact file for a contact within one of the user collections for which the second contact file already exists within the firm collection.

17. (Original) The relationship management system of claim 2, wherein the administration routine is further adapted to process the detected change to detect a user request for an administrator to make a change to the firm collection.

18. – 36. (Canceled)

37. (Currently amended) A relationship management system, comprising:
a database that stores a plurality of user collections, wherein each user collection is accessible by a user of the system and including includes one or more first contact files, with the different first contact files within a particular user collection having data pertaining to a different contact, the database further storing a firm collection, wherein each firm collection is accessible by an administrator of the system, the firm collection including a second contact file for each different first contact file included in the plurality of user collections, wherein each second contact file within the firm collection has data associated with one of the contacts for which a first contact file exists within one or more of the plurality of user collections;

an administration routine stored in a memory and adapted to be executed on a processor to detect a change made to one of the first contact files associated with a particular contact within one or more of the plurality of user collections, to generate an event action in response to detecting the change, the event action consisting of an accept action, a review action, a submit action, or a follow-up action, to classify the change as one or more of add, edit, delete, format change, and suspect change, and to send a message including the event action classified change to the administrator of the system; and

a change management routine stored in the memory and adapted to be executed on the processor to receive a response to the message event action from the administrator, and to process the response by one or more of approving, rejecting, or following-up on the change event action with a different owner having a user collection that includes the common data;

wherein approving the change prompts the relationship management system to make the change to the corresponding second contact file within the firm collection.

38. (Previously presented) The relationship management system of claim 37, further including a user collection change routine adapted to make a change to common data of a first contact file associated with the particular contact within a second one of the user collections based on the change made to the common data of the corresponding second contact file associated with the particular contact within the firm collection.

39. (Currently amended) The relationship management system of claim 38, wherein the administration routine is further adapted to provide the message to ~~a firm~~ the administrator at ~~the data~~ an administrator interface, the message reflecting the nature of the detected change made to one of the contact files associated with a particular contact within one or more of the plurality of user collections.

40. (Currently amended) The relationship management system of claim 39, wherein the [[data]] administrator interface is adapted to enable the [[firm]] administrator to accept or reject the detected change before the administration routine makes the change to the common data of the corresponding second contact file associated with the particular contact within the firm collection.

41. (Original) The relationship management system of claim 39, wherein the administration routine includes a rule database that stores rules pertaining to the manner in which the detected change is to be processed.

42. (Original) The relationship management system of claim 41, wherein the rules are changeable by the administrator.

43. (Original) The relationship management system of claim 38, wherein the administration routine is further adapted to process the detected change to detect a suspected error within the detected change.

44. (Previously presented) The relationship management system of claim 43, wherein the administration routine is further adapted to provide a message to a firm administrator reflecting a description of the suspected error within the detected change.

45. (Original) The relationship management system of claim 38, wherein each of the user collections includes a change attribute that specifies a manner in which a change made to the firm collection is to be reflected within the user collection.

46. (Original) The relationship management system of claim 45, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be automatically made to the user collection.

47. (Original) The relationship management system of claim 45, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be reported to a user having access to the user collection for which the change attribute exists.

48. (Original) The relationship management system of claim 45, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be accepted by the user having access to the user collection for which the change attribute exists before being made to the user collection for which the change attribute exists.

49. (Original) The relationship management system of claim 38, wherein each of the user collections includes a visibility field that specifies if a change made to a contact file within the user collection is to be shared with the firm collection.

50. (Original) The relationship management system of claim 49, wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of one of the contact information fields.

51. (Original) The relationship management system of claim 49, wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of an entire contact file.

52. (Previously presented) The relationship management system of claim 38, wherein the administration routine is further adapted to process the detected change to detect the addition of the first contact file for a contact within one of the user collections for which the second contact file already exists within the firm collection.

53. (Original) The relationship management system of claim 38, wherein the administration routine is further adapted to process the detected change to detect a user request for an administrator to make a change to the firm collection.

54. (Currently amended) A relationship management system, comprising:
a database that stores a plurality of first contact files accessible to a user of the system and a second contact file for each different first contact file, the second contact file accessible by an administrator of the system, wherein each of the first contact files includes data pertaining to a different contact and each of the second contact files includes data in common with a corresponding first contact file;

an administration routine stored in a memory and adapted to be executed on a processor to detect a change made to one of the first contact files associated with a particular contact, to generate an event action in response to detecting the change, the event action consisting of an accept action, a review action, a submit action, or a follow-up action, to classify the change as one or more of add, edit, delete, format change, and suspect change, and wherein the administration routine is further adapted to provide a message to the administrator of the system including the event action detected, classified change made to one of the contact files; and

a change management routine stored in a memory and adapted to be executed on a processor to receive a response to the message event action from the administrator, and to process the response by one or more of approving, rejecting, or following-up on the change, or rejecting the change event action with a different owner having a user collection that includes the common data;

wherein approving the change prompts the administration routine to make the change to the second contact file that includes the data in common with the corresponding first contact file.

55. (Canceled)

56. (Original) The relationship management system of claim 53, wherein the administration routine includes a rule database that stores rules pertaining to the manner in which the detected change is to be processed.

57. (Original) The relationship management system of claim 0, wherein the rules are changeable by the firm administrator.

58. (Original) The relationship management system of claim 53, wherein the administration routine is further adapted to process the detected change to detect a suspected error within the detected change.

59. (Original) The relationship management system of claim 0, wherein the administration routine is further adapted to provide a message to a firm administrator reflecting the nature of the suspected error within the detected change.

60. – 66. (Canceled)

67. (Currently amended) A relationship management system, comprising:
a processor in communication with a memory and a server via an information network, the information network including a plurality of user interfaces and one or more administrator interfaces and employing a communication protocol to facilitate communication between the processor, the memory, the server, and the plurality of user and administrator interfaces, wherein each of the user and administrator interfaces includes a display routine for creating a user interface screen for display on a user interface display screen and an administrator interface screen for display on an administrator interface display screen and an access routine for communicating with the server via the information network, and wherein the display routine and the access routine facilitate at least one of accessing, storing, deleting, changing, and managing a first database and a second database;

the first database stored in the memory and including a first user collection accessible to a first user of the system and second user collection accessible to a second user of the system, each user collection including one or more contact files, with the different contact files within each user collection having data pertaining to different contacts; and

the second database stored in the server and including a firm collection accessible to an administrator of the system, the firm collection including a duplicate contact file for each different contact file included in the first user collection and the second user collection, wherein each of the duplicate contact files within the firm collection includes data associated with one of the contacts for which a contact file exists within ~~at least~~ one or more of the first and second user collections;

wherein the first user collection stores ~~at least one or more~~ contact files associated with a particular contact, the second user collection stores ~~at least one or more~~ contact files associated with the particular contact, and the firm collection stores the duplicate contact file associated with the particular contact file stored within the first and second user collections;

an administration routine stored in the memory and executed by the processor, wherein the administration routine detects when the first user makes a change to the ~~at least one or more contact files~~ associated with the particular contact within the first user collection, ~~classifies the change as one or more of add, edit, delete, format change, and suspect change generates an event action in response to detecting the change, the event action consisting of an accept action, a review action, a submit action, or a follow-up action,~~ and sends a message including the ~~classified change event action~~ to the administrator interface;

wherein the message to the administrator ~~of the system interface~~ includes information related to the nature of the change made to the one or more contact files associated with the particular contact within the first user collection;

a change management routine ~~stored in the memory and executed by the processor~~ wherein the change management routine ~~[[to]] receives a response to the message event action from the administrator interface, and [[to]] processes the response by one or more of approving, rejecting, or following-up on the echange event action with the second user having the second user collection that includes the common data;~~

wherein, upon accepting ~~approving~~ the change ~~based on the nature of the change~~, the relationship management system makes a corresponding change to the duplicate contact file associated with the particular contact within the firm collection; and

~~wherein, upon accepting the change based on the nature of the change, the relationship management system makes the corresponding change to the particular contact within the second user collection.~~

68. (Canceled)

69. (Previously presented) The relationship management system of claim 67, wherein each user collection is accessible by a different user and further comprising a display routine stored on a computer-readable medium, wherein the display routine is adapted to display the data pertaining to different contacts stored within each user collection to the user having access to the user collection.

70. (Currently amended) The relationship management system of claim [[68]] 67, wherein the firm collection is administered by [[a firm]] the administrator.

71. - 73. (Canceled)

74. (Original) The relationship management system of claim 67, wherein each of the user collections includes a change attribute that specifies a manner in which a change made to the firm collection is to be reflected within the user collection.

75. (Original) The relationship management system of claim 74, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be automatically made to the user collection.

76. (Original) The relationship management system of claim 74, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be reported to a user having access to the user collection for which the change attribute exists.

77. (Original) The relationship management system of claim 74, wherein the change attribute, when set to a first value, specifies that a change to the firm collection is to be accepted by the user having access to the user collection for which the change attribute exists before being made to the user collection for which the change attribute exists.

78. (Original) The relationship management system of claim 67, wherein each of the user collections includes a visibility field that specifies if a change made to a contact file within the user collection is to be shared with the firm collection.

79. (Original) The relationship management system of claim 78, wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of one of the contact information fields.

80. (Original) The relationship management system of claim 78, wherein each of the contact files includes a plurality of contact information fields and wherein the visibility flag specifies a visibility of an entire contact file.

81. – 84. (Canceled)

85. (New) The system of claim 1, wherein the accept action indicates that the administrator does not want to monitor the change, the review action indicates that the administrator wants to monitor the change, the submit action indicates that the administrator wants to approve the change before performing either the accept action or the review action, and the follow-up action provides a means of notifying the different owner of the change before the change routine processes the response.